

## **Investnet Insurance Exchange Launches Platform With Six Carriers**

*Advisors gain access to robust selection of annuities on single, integrated platform*

**CHICAGO – Feb. 27, 2019** – Investnet Insurance Exchange, a new insurance network that integrates insurance solutions into the wealth management process on the Investnet platform, now offers access to a robust line-up of six carriers. Investnet Insurance Exchange will streamline and enhance advisors' ability to deliver the full lifecycle of financial advice to their clients. The carriers, Allianz Life, Brighthouse Financial, Global Atlantic Financial Group, Jackson National Life Insurance Company, Nationwide and Prudential Financial, offer a variety of variable, structured, fixed and indexed annuities to advisors through the Investnet Insurance Exchange. Investnet is actively working to onboard advisors to the pilot program and plans a broad-market release of the Insurance Exchange in June 2019.

"After months of preparation, we're proud to introduce financial solutions from a well-respected group of insurance carriers on the Investnet Insurance Exchange," said Bill Crager, Chief Executive of Investnet Wealth Solutions. "We believe advisors who offer integrated advice to their clients can help them achieve better outcomes. By bringing more choices to the enterprises we work with and their advisors, we believe we are one step closer to helping them deliver complete financial wellness to their clients."

Investnet Insurance Exchange is backed by Fiduciary Exchange, LLC (FIDx), a technology-empowered network that seamlessly integrates the brokerage, insurance and advisory ecosystems. The partnership was initially announced at the Investnet Advisor Summit in May 2018. Since then, Investnet and FIDx have worked together to add a strong line-up of reputable carriers and annuity solutions. FIDx's technology unites insurance carriers and wealth management platforms empowering advisors to fully integrate annuities and the benefits of insurance into clients' portfolios.

"FIDx is excited to be working with the industry's largest wealth management platform, Investnet, and a network of highly-regarded insurance carriers in helping advisors address their clients' need of guaranteed retirement income," said Brian Serfass, Chief Marketing Officer of FIDx.

Insurance solutions, specifically annuities, offer several advantages for long-term investing, including tax deferral, guaranteed income and principal protection. Through Investnet Insurance Exchange, advisors and their clients will benefit from the following:

- Industry recognized selection of carriers and annuity products
- Daily annuity performance reporting aligning with traditional asset classes
- Integration of annuities into asset allocation models
- Simplified account opening, processing and management of annuities on platform
- Ability to advise on annuities within the managed account ecosystem and conduct in-force transactions on platform
- Fee-based and commission-based annuity offerings

Investnet Insurance Exchange will be available through the sponsor and advisor portals on the Investnet platform.

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### **About Investnet**

Investnet, Inc. (NYSE: ENV) is a leading provider of intelligent systems for wealth management and financial wellness. Investnet's unified technology empowers enterprises and advisors to more fully understand their clients and deliver actionable intelligence that drives better outcomes and improves lives.

Investnet Wealth Solutions enables enterprises and advisors to better manage client outcomes and strengthen their practices through its leading Wealth Management Operating System and advanced portfolio solutions. Investnet Tamarac provides portfolio management, reporting, trading, rebalancing

and client portal solutions for registered independent advisors (RIAs). Envestnet Data & Analytics provides intelligent solutions that enable dynamic innovation through its Envestnet Yodlee platform.

More than 3,500 enterprises and over 96,000 advisors including: 15 of the 20 largest U.S. banks, 43 of the 50 largest wealth management and brokerage firms, over 500 of the largest Registered Investment Advisors, and hundreds of Internet services companies leverage Envestnet technology and services.

For more information on Envestnet, please visit [www.envestnet.com](http://www.envestnet.com) and follow @ENVintel.

### **About Fiduciary Exchange LLC**

Fiduciary Exchange, LLC (FIDx) is a technology-empowered network that seamlessly integrates the brokerage, insurance and advisory ecosystems to offer best-in-class annuities and insurance solutions from the industry's leading carriers. Motivated by its mission to expand the frontiers of the wealth management space and provide holistic solutions to address investors' changing needs, FIDx enables advisors to offer guaranteed income and downside protection as core components of their clients' portfolios—integrated within the same wealth management platforms they already use every day. An independent technology firm led by seasoned industry veterans and built from the ground-up as an integrated platform, FIDx is providing a modern solution to bridge advisory firms to insurance carriers so advisors can truly deliver comprehensive advice, enabling their clients to achieve retirement security.

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